

Request Form Details


Note This article is for BrightWork 365 Release Sep 2023 (v1.8) and newer.

Request Tabs

Request Details

The Request Details tab contains fields relevant to moving the request process forward as well as fields that will be copied over to the related new project that eventually gets created.

After the Requestor clicks the **Submit** switch on the Request Details tab, an email with request details will be sent to the Request Submitter, Approvals Coordinator and the nominated Approvers.

| | | | | | |
|-------------------|--|---------------------------------|---------|----------------------|-------------------------------------|
| Request Details | Project Details | Approvals | History | Related | ▼ |
| Request Details | | | | | |
| Request Reference | Req-003550 | Project Description and Purpose | --- | Out of Scope | --- |
| Request Template | *  Product Update | Project Objectives | --- | Support Project Type | --- |
| Title | * Project Acme | Economic Impact | --- | Submit Request | <input checked="" type="radio"/> No |

Note When the back arrow is clicked while on the Request Details tab, the Request form will reload rather than load the view or record from which you opened the request record.

Project Details

The **Project Details** tab in Requests will be visible for users given the **BrightWork Team Member** security role.

The values for the following fields in Project Details can be specified in the Project Template and will automatically populate the corresponding columns in the Project Details tab of new Requests:

- Content Template
- Portfolio
- Program
- Project Manager
- Project Sponsor
- Project Type

Project Acme - Saved

Request · Product Update

Project Acme Name

Request 2 Approvals

Active for less than one mi...

Draft (< 1 Min)

Accepted

Request Details

Project Details

Approvals

History

Related

Project Template

Product Update

Project Name

Project

Content Template

Content Template from Danista Proj...

Project Manager

Anne Wallace (Offline)

Project Created

Submit Date

Project Sponsor

Alex Hankin (Offline)

Group Manager

Portfolio

ACME Portfolio

Program

ACME Program

Project Type

Strategic

Approvals

The **Approvals** tab in Requests will be visible for users given the **BrightWork Approvals Coordinator** security role.

Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the Approvals tab. The default settings are controlled by the configuration that is set in **Templates Area | Request Templates**.

Approvals Coordinator

The Approvals Coordinator helps to keep the approval process moving along. The Approvals Coordinator field is a lookup field and security role. This user must be given the BrightWork Approvals Coordinator security role in addition to being selected as the Approvals Coordinator in the Request Template.

The Approvals Coordinator does not make approval decisions; all stage approvals are done by the nominated Approvers. The Approvals Coordinator also does not move the process from one stage to the next via the Business Process Flow; this must be done via approvals completed by the nominated Approvers.

The Approvals Coordinator will be sent approval related notifications.

Create Project

The **Create Project** toggle button will appear in the Approvals tab of a request that has been configured to not auto create projects. The Approvals Coordinator can toggle the button to create a project when the button becomes enabled.

Request 2 Approvals
Active for 3 hours

Draft

Accepted

Approved (16 Min)

Request Details

Project Details

Approvals

History

Related

Approvals Detail

Approvals Coordinator*

Jonathan Weisglass (Busy)

Request Template*

Project Request 2 Approval

Auto-create Project

☐

Create Project

☐ No

Approval Start

If **Approval Start** is set to **Automatic**, the approval process starts as soon as the previous approval gets approved.

If **Approval Start** is set to **Manual**, the Approvals Coordinator gets notified that they have an approval to manually start after the previous approval gets approved, and the **Start Approval** button on the **Approvals** tab will become enabled.

Project Orange - Saved
Request · Project Request

Project Orange
Name

Approved
Request Status

Request 2 Approvals
Active for 1 minute

Draft

Accepted (< 1 Min)

Request Details

Project Details

Approvals

History

Related

Approvals Detail

Approvals Coordinator*

Jonathan Weisglass (Busy)

Request Template*

Project Request 2 Approval

Auto-create Project

☐

Start Approval

☐ No

History

The History tab displays a history of the approvals process.

Request 2 Approvals

Active for 24 hours

Draft (24 Hrs)

Accepted

Request Details

Project Details

Approvals

History

Related

| <input type="checkbox"/> | Name | Stage | Outcome | Date | Comment |
|--------------------------|--------------------|-------------------|-----------|--------------------|-------------------|
| | Jonathan Weisglass | Draft to Accepted | Submitted | 1/24/2023 8:42 ... | Request Submitted |
| | Anne Wallace | Draft to Accepted | Approve | 1/24/2023 8:45 ... | |
| | Dan Bacon | Draft to Accepted | Approve | 1/24/2023 8:47 ... | |